



January 31, 2013

Mr. Kenny Zajicek
Chief Fiscal Officer
Texas Soil and Water Conservation Board
P.O. Box 658
Temple, TX 76503

Re: Texas Soil and Water Conservation Board
2nd Recertification, Amendment Number 1

Dear Mr. Zajicek:

Enclosed are approved amendment pages to your records retention schedule. Please maintain these pages with your currently approved schedule so that they can be easily referenced.

We appreciate your efforts in maintaining an up-to-date schedule. Making additions and changes to your schedule as you identify them not only ensures the integrity of your recordkeeping practices, but keeps your agency in compliance with state regulations (13 TAC §6.4) requiring the submission of any needed amendments to a retention schedule during its certification period to keep the information in the schedule current.

We will notify you of the date your schedule is due for recertification. Any additional approved amendments to your schedule, such as this one, should be incorporated into your main retention schedule prior to submitting it for recertification.

Thank you again for your commitment to complying with state records management laws and regulations. If we can provide any assistance to you, please call the information analyst assigned to your agency, Bret Adams, at 512-936-0270.

Sincerely,

Craig Kelso
Director and State Records Administrator

Enclosure

cc: State Auditor, State Archivist
cc: (without enclosure) Rex Isom

State and Local
Records Management

P.O. Box 12927
Austin, Texas
78711-2927

4400 Shoal Creek Blvd.
Austin, Texas
78756

www.tsl.state.tx.us

Commission Chairman
Michael C. Waters

Members
Sharon T. Carr
Martha Doty Freeman
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Larry G. Holt
Wm. Scott McAfee
Sandra J. Pickett

*Interim
Director and Librarian*
Edward Seidenberg

*Preserving yesterday,
informing today,
inspiring tomorrow.*

R01-592/592

BL



STATE OF TEXAS Records Retention Schedule Certification

SLR 105C
Form SLR 105 or SLR 122
must accompany all
submissions of this form.

Section 1. Agency Information (Submitting agencies complete this section only)

Agency Code 592
Agency Name Texas State Soil and Water Conservation Board

(Check one)

- Initial Certification - Form SLR 105
- Recertification - Form SLR 105
- Amendment - Form SLR 122

I hereby certify that this records retention schedule was prepared in accordance with Texas Government Code, Chapter 441, Subchapter L.

(Check one)

- Agency Head
- Records Management Officer

Signature
Name (Print or type) Kenny Zajicek
Date 06/27/2012

Section 2. Approvals (Submitting agencies do not write in this section)

State Auditor's Office
(For the exclusive use of the State Auditor's Office)
Not Required at This Time
Signature _____
Name (Print or type) _____
Date _____

Texas State Library and Archives Commission
(For the exclusive use of the State Library and Archives Commission)
Signature
Name (Print or type) Donna Osborne
Date 7/29/13

Cert/Recert No. 2 Amendment No. 1

CAUTION

A state record whose retention period has expired may not be destroyed if any litigation, claim, negotiation, audit, public information request, administrative review, or other action involving the record is initiated; its destruction shall not occur until the completion of the action and the resolution of all issues that arise from it.

A state record whose retention period expires during any litigation, claim, negotiation, audit, public information request, administrative review, or other action involving the record may not be destroyed until the completion of the action and the resolution of all issues that arise from it.





Texas
State Library
and Archives
Commission

STATE OF TEXAS

Records Retention Schedule Amendment

SLR 122

Form SLR 105C must accompany this form.

1. Page 1 of 1

2. Agency Code 592		3. Agency Name Texas State Soil and Water Conservation Board								
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	10. 106 No.	11. Current Schedule		12. Amend. Type
			Agency	Storage	Total			9. Remarks	Page No.	

4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period Agency	7. Retention Period Storage	7. Retention Period Total	8. Archival	9. Remarks	10. 106 No.	11. Current Schedule Page No.	11. Current Schedule Agency Item No.	12. Amend. Type
1.1.007	118	Correspondence - Administrative	4		4	R	Only the administrative correspondence of executive staff, board or commission members, division directors and program heads require archival review.		9	118	C
1.1.008	119	Correspondence - General	2		2				9	119	C

Retention Codes (Field 7)			Archival Codes (Field 8)		Amendment Codes (Field 12)	
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	MO – Months	A – Transfer to State Archives	N – New	C – Changed	
AV – Administrative Value	FE – Fiscal Year End	PM – Permanent	R – Review by State Archivist	D – Deleted	D – Deleted	
	LA – Life of Asset	US – Until Superseded				



July 15, 2010

Mr. Kenny Zajicek
Chief Fiscal Officer
Texas Soil and Water Conservation Board
P.O. Box 658
Temple, TX 76503

RE: Texas Soil and Water Conservation Board
Retention schedule due last working day of July 2011.

Dear Mr. Zajicek:

Enclosed is a copy of your recertified records retention schedule. Please ensure all old copies of the schedule are superseded with this recertified copy.

Your recertified retention schedule provides you with continuing authorization to dispose of agency records according to its terms. Please note that state regulations (13 TAC §6.8) require documentation of the final disposition of records by your agency. This requirement may be met by maintaining a disposition log or other evidence of the records series titles, dates covered, volume, and date of disposition. We urge on you the importance of disposing of the records of your agency in a timely manner in accordance with the retention periods on your schedule. The destruction of any records of your agency not on your schedule requires special authorization from us.

During a certification period, state regulations (13 TAC §6.4) also require the submission of amendments to the retention schedule as needed to keep the information in the schedule current. If you are not familiar with the amendment process, contact the government information analyst assigned to your agency.

Your efforts in maintaining an up-to-date records retention schedule are appreciated. It not only helps to ensure the integrity of your recordkeeping practices, but it is also essential to the success of your records management program. Your schedule will be due for recertification on the last working day of July 2011. If you have any questions, call the information analyst assigned to your agency, Bret Adams, at 512-421-7204.

Sincerely,

Jan Ferrari
Director and State Records Administrator

Enclosure

cc: State Auditor, State Archivist
cc: (without enclosure) Rex Isom

State and Local
Records Management

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Commission Chairman
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Sally Reynolds
Michael C. Waters

Director and Librarian
Peggy D. Rudd

Assistant State Librarian
Edward Seidenberg

*Making
information
work
for all
Texans*



STATE OF TEXAS
Records Retention Schedule Certification

SLR 105C

Form SLR 105 or SLR 122 must accompany all submissions of this form.

Section 1. Agency Information

(Submitting agencies complete this section only)

Agency Code 592
 Agency Name Texas State Soil and Water Conservation Board

(Check one)

- Initial Certification - Form SLR 105
- Recertification - Form SLR 105
- Amendment - Form SLR 122

I hereby certify that this records retention schedule was prepared in accordance with Texas Government Code, Chapter 441, Subchapter L.

(Check one)

- Agency Head
- Records Management Officer

Signature
 Name *(Print or type)* Kenny Zajicek
 Date May 18, 2010

Section 2. Approvals

(Submitting agencies do not write in this section)

State Auditor's Office
(For the exclusive use of the State Auditor's Office)

Not Required at This Time

Signature _____
 Name *(Print or type)* _____
 Date _____

Texas State Library and Archives Commission
(For the exclusive use of the State Library and Archives Commission)

Signature
 Name *(Print or type)* Peggy D. Rudd
 Date 7/12/10

Recertification No. 1 Amendment No. _____

Texas State Records Retention Schedule
4th Edition

CAUTION

A state record whose retention period has expired may not be destroyed if any litigation, claim, negotiation, audit, public information request, administrative review, or other action involving the record is initiated; its destruction shall not occur until the completion of the action and the resolution of all issues that arise from it.

A state record whose retention period expires during any litigation, claim, negotiation, audit, public information request, administrative review, or other action involving the record may not be destroyed until the completion of the action and the resolution of all issues that arise from it.





STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

Page 1 of 19

2. Agency Code 592		3. Agency Name Texas State Soil and Water Conservation Board						
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total			

4.1.001	1	Accounts Payable Information	FE+1	5	FE+6			
4.1.002	2	Billing Detail	FE+1	5	FE+6			
4.1.003	3	Cancelled Warrants	FE+1	5	FE+6			
4.1.004	4	Encumbrance Detail	FE+1	5	FE+6			
4.1.005	5	Inventory	FE+1	5	FE+6			
4.1.007	6	Transfers or Budget Revisions	FE+1	5	FE+6			
4.1.008	7	Electronic Fund Transfers	FE+1	5	FE+6			
4.2.001	8	Cash Deposit Vouchers	FE+1	5	FE+6			
4.2.002	9	Cash Receipts	FE+1	5	FE+6			
4.2.003	10	Daily Cash Receipts Logs	FE+1	5	FE+6			
4.2.004	11	Encumbrance Vouchers	FE+1	5	FE+6			
4.2.005	12	Purchase Vouchers	FE+1	5	FE+6			
4.2.006	13	General Journal Vouchers	FE+1	5	FE+6			
4.2.007	14	Expenditure Vouchers	FE+1	5	FE+6			
4.3.001	15	Sales Journals or Registers	FE+1	5	FE+6			
4.3.002	16	Receipts Journals or Registers	FE+1	5	FE+6			
4.3.003	17	Expenditures Journals	FE+1	5	FE+6			
4.4.001	18	General Ledgers	FE+1	5	FE+6			
4.4.002	19	Accounts Receivable Ledgers	FE+1	5	FE+6			
4.4.003	20	Accounts Payable Ledgers	FE+1	5	FE+6			

Retention Codes (Field 7)				Archival Codes (Field 8)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives			
AV – Administrative Value	FE – Fiscal Year End	MO – Months	US – Until Superseded	R – Review by State Archivist			



STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

Page 2 of 19

2. Agency Code 592		3. Agency Name Texas State Soil and Water Conservation Board							
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			Agency	Storage	Total				

4.5.001	21	Worksheets for Fiscal Reports	FE+3		FE+3				
4.5.002	22	Internal Fiscal Reports	FE+3		FE+3				
4.5.003	23	Annual Financial Reports	AC+10		AC+10		AC = September 1 of odd numbered calendar years		
4.5.005	24	External Fiscal Reports	FE+1	5	FE+6				
4.5.007	25	USAS Reports -Daily	FE+6		FE+6		AC = Receipt and reconciliation of the monthly report		
4.5.008	26	USAS Reports - Monthly	FE+6		FE+6		AC = Receipt and reconciliation of the annual report		
4.5.009	27	USAS Reports - Annual	FE+6		FE+6				
4.6.001	28	Balancing Records	FE+1	5	FE+6				
4.6.002	29	Reconciliations	FE+1	5	FE+6				
4.6.003	30	Cash Counts	FE+1	5	FE+6				
4.7.001	31	Accounting Procedures	US+3		US+3				
4.7.002	32	Bank Statements	FE+6		FE+6				
4.7.003	33	Returned Warrants	AC+6		AC+6		AC = After deemed uncollectible		
4.7.004	34	Capital Asset Records	LA+3		LA+3				
4.7.005	35	Claim Files	AC+3		AC+3		AC= Resolution of claim		
4.7.006	36	Comptroller Statements	FE+3		FE+3				
4.7.007	37	Detail Chart of Accounts	FE+1	5	FE+6				

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STATE OF TEXAS

Records Retention Schedule

SLR 105

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2. Agency Code 592		3. Agency Name Texas State Soil and Water Conservation Board						
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			Agency	Storage	Total			

4.7.008	38	Federal Grant Records	AC+3	4	AC+7	AC = Satisfaction of all Uniform Administrative Requirements for Grants and Cooperative Agreements to State and Local Governments (the Common Rule).		
4.7.009	39	Fixed Asset Logs	US+7		US+7			
4.7.010	40	Long-Term Liability Records	AC+7		AC+7	AC=Retirement of Debt		
4.7.011	41	Texas Building and Procurement Commission (TBPC) Statements	FE+1	5	FE+6			
4.7.012	42	Signature Authorizations	US+FE+6		US+FE+6			
5.1.001	43	Contracts and Leases	AC+4		AC+4	AC = Expiration or termination of the instrument according to its terms. SEE item number 5.2.028 for building construction contracts and item number 5.1.017 for contract logs.		
5.1.003	44	Delivery Reports	2		2			
5.1.004	45	Mail and Telecommunications Listings	US		US			
5.1.005	46	Postage Records	FE+3		FE+3			
5.1.007	47	Requisitions for In-Agency/Inter-Agency Copy/Printing Service	AV		AV			
5.1.010	48	Licenses and Permits for Non-vehicles	AC+2		AC+2	AC = Expiration date of license or permit.		

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Records Retention Schedule

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			Agency	Storage	Total				

5.1.011	49	Photocopier and Telefax Usage Logs & Reports	AV		AV				
5.1.012	50	Charge Schedules/Price Lists	US+3		US+3				
5.1.013	51	Insurance Policies	AC+4		AC+4		AC = Expiration or termination of the policy according to its terms.		
5.1.014	52	Office Procedures	US+1		US+1				
5.1.015	53	Correspondence Tracking Records	1		1				
5.1.017	54	Contract Log	FE+3		FE+3				
5.2.001	55	Appraisals – Building or Property	AV		AV	R			
5.2.002	56	Building Construction Project Files	AC+10		AC+10	R	AC = Completion of project.		
5.2.003	57	Building Plans and Specifications	State owned: LA Leased: AC+2		State owned: LA Leased: AC+2	R	AC = For leased buildings; termination or cancellation of lease.		
5.2.004	58	Building Space Requests	1		1				
5.2.005	59	Calibration Records (Equipment or Instrument)	10		10				
5.2.006	60	Property Destruction, Certificates of	FE+3		FE+3				
5.2.007	61	Damage Reports	FE+3		FE+3				
5.2.008	62	Equipment History File; Equipment Service Agreements	LA+3		LA+3				
5.2.009	63	Equipment Inventory Detail Report Forms	FE+3		FE+3				

Retention Codes (Field 7)				Archival Codes (Field 8)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives			
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STATE OF TEXAS

Records Retention Schedule

SLR 105

Form SLR 105C must accompany this form.

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2. Agency Code 592		3. Agency Name Texas State Soil and Water Conservation Board						
4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period			8. Archival 9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
			Agency	Storage	Total			

4.	5.	6.	7.			8.	9.	10.	11.
Records Series Item No.	Agency Item No.	Record Series Title	Agency	Storage	Total	Archival	Remarks	106 No.	TSLAC ONLY Amend. No.
5.2.010	64	Equipment Manuals	LA		LA				
5.2.011	65	Equipment Warranties	AC+1		AC+1		AC = Expiration of Warranty.		
5.2.012	66	Estimate Files (Supply and Repair Cost Estimates)	1		1				
5.2.014	67	Inventory – Annual Physical	FE+3		FE+3				
5.2.015	68	Inventory, Notices of Equipment Removed From	FE+3		FE+3				
5.2.016	69	Inventory System Update Listings	AC		AC		AC = Transfer of information into annual listing.		
5.2.017	70	Lost & Stolen Property Reports	FE+3		FE+3				
5.2.018	71	Quality Control Reports	2		2				
5.2.019	72	Service Orders	1		1				
5.2.020	73	Supply Usage Records	FE+1		FE+1				
5.2.021	74	Surplus Property Sale Reports	FE+3		FE+3				
5.2.022	75	Utility Usage Reports	AV		AV				
5.2.023	76	Year-to-Date Activity (Inventory Listing)	FE+3		FE+3				
5.2.024	77	Material Specifications	AC+2		AC+2		AC = Material is no longer in the agency.		
5.2.025	78	Equipment Descriptions and Specifications	AC+2		AC+2		AC = Equipment is no longer in the agency.		
5.2.026	79	Facilities Reservation Logs	2		2				
5.2.027	80	Space Utilization Reports	AV		AV				
5.2.028	81	Building Construction Contract and Inspection Records	LA+10		LA+10	R			

Retention Codes (Field 7)				Archival Codes (Field 8)			
AC – After Closed, Terminated, Completed, Expired, Settled	CE – Calendar Year End	LA – Life of Asset	PM – Permanent	A – Transfer to State Archives			
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STATE OF TEXAS

Records Retention Schedule

SLR 105

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2. Agency Code 592		3. Agency Name Texas State Soil and Water Conservation Board						
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			Agency	Storage	Total			

5.3.002	82	Freight Bills Paid	FE+3		FE+3			
5.3.003	83	Freight Claims	AC+2		AC+2		AC = Resolution of claim.	
5.3.004	84	Order – Acknowledgments	AV		AV			
5.3.005	85	Packing Slips	AV		AV			
5.3.007	87	Bid Documentation	FE+3		FE+3			
5.3.008	88	Purchasing Logs	FE+3		FE+3			
5.3.009	89	Requests for Information	AC		AC		AC = Date of direct purchase, issuance of request for bids, or decision not to proceed with the procurement, as applicable.	
5.4.001	90	Accident Reports and Associated Documentation	CE+5		CE+5		29 CFR 1904.33. The Texas Department of Insurance retains copies of the reports submitted to it for 50 years.	
5.4.002	91	Evacuation Plans	US		US			
5.4.003	92	Inspection Records	AC+3		AC+3		AC = Inspection, or date of the correction of the deficiency if the inspection report reveals a deficiency.	
5.4.004	93	Fire Orders	AC+3		AC+3		AC = Deficiency corrected.	
5.4.007	94	Hazardous Materials Training Records	5		5		Texas Health and Safety Code, 502.009(g).	
5.4.008	95	Hazard Communication Plans	US+5		US+5		Texas Health and Safety Code, 502.009(g).	
5.4.009	96	Workplace Chemical Lists	30		30		Texas Health and Safety Code, 502.005(d).	

Retention Codes (Field 7)				Archival Codes (Field 8)			
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STATE OF TEXAS Records Retention Schedule

SLR 105

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Page 1 of 19

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			Agency	Storage	Total			

5.4.010	97	Material Safety Data Sheets	AC		AC	AC = After sheets are updated or hazardous chemical no longer stored by agency, as applicable.		
5.4.011	98	Visitor Control Registers	3		3			
5.4.012	99	Security Access Records	AC+2		AC+2	AC = Until superseded, date of expiration, or date of termination, whichever sooner.		
5.4.013	100	Disaster Preparedness and Recovery Plans	US		US			
5.5.001	101	Billing Detail - Telecommunications (Other Than TEX-AN)	FE+3		FE+3			
5.5.002	102	Long Distance Telephone Logs	AV		AV			
5.5.003	103	Station Activity Reports	AV		AV			
5.5.004	104	System Activity Reports	AV		AV			
5.5.006	105	Billing Detail - Telecommunications (TEX-AN)	FE+3		FE+3	The billing agency will maintain all long distance TEX-AN records and will provide each using agency its bill summary of centralized capitol complex telephone service without call detail records. For these bill summaries		
5.5.007	106	Disputed Call Documentation	FE+3		FE+3			

Retention Codes (Field 7)				Archival Codes (Field 8)			
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Records Retention Schedule

SLR 105

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			Agency	Storage	Total					

4. Records Series Item No.	5. Agency Item No.	6. Record Series Title	7. Retention Period	8. Archival	9. Remarks	10. 106 No.	11. TSLAC ONLY Amend. No.
5.6.001	107	Airplane Flight Logs	State owned: LA + 3 Leased: FE + 3	State owned: LA + 3 Leased: FE + 3			
5.6.002	108	Airplane Passenger Lists	FE + 3	FE + 3			
5.6.003	109	Inspection Repair and Maintenance Records-Vehicles	LA+1	LA+1			
5.6.004	110	License and Driving Records Checks	AC	AC	AC = Until superseded or until termination of employment.		
5.6.005	111	Vehicle Use Reports	FE + 3	FE + 3			
5.6.007	112	Vehicle Titles & Registrations	LA	LA			
5.6.008	113	Pilot License Verifications	AC+5	AC+5	AC = Termination of employment.		
5.6.009	114	Parking Permits or Assignments	US	US			
1.1.002	115	Audits	AC+7	AC+7	AC = Publication or release of final audit findings. The State Auditor's Office retains any copies of its audits performed on Texas state agencies.		
1.1.004	116	Legislative Appropriation Requests	AC+6	AC+6	A AC = September 1 of odd-numbered calendar years.		
1.1.006	117	Complaint Records	AC+2	AC+2	AC = Final disposition of the complaint.		

Retention Codes (Field 7)				Archival Codes (Field 8)			
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Records Retention Schedule

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			Agency	Storage	Total					

1.1.007	118	Correspondence – Administrative	3		3	R	Only the administrative correspondence of executive staff, board or commission members, division directors and program heads require archival review.		
1.1.008	119	Correspondence – General	1		1				
1.1.010	120	Directives	US+1		US+1				
1.1.011	121	Executive Orders	US+3		US+3	A			
1.1.013	122	Calendars, Appointment and Itinerary Records	CE+1		CE+1	R	Only the calendars, appointment, and itinerary records of elected officials, executive staff, board or commission members, division directors, and program heads require archival review.		
1.1.014	123	Legal Opinions and Advice	AV		AV	R			
1.1.019	124	Public Relations Records	2		2	R			
1.1.020	125	Public Information Requests-Not Exempted	AC+1		AC+1		AC = Date request fulfilled.		
1.1.021	126	Public Information Requests-Exempted	AC+2		AC+2		AC = Date of notification that records are exempt.		
1.1.023	127	Organization Charts	US		US	A			
1.1.024	128	Plans and Planning Records	AC+3		AC+3	R	AC = Decision made to implement or not to implement result of planning process.		
1.1.026	129	Texas Register Submission	AC+1		AC+1		AC = Date of publication in the Texas Register.		

Retention Codes (Field 7)				Archival Codes (Field 8)			
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			Agency	Storage	Total					

1.1.027	130	Proposed Legislations	AV		AV			
1.1.038	131	Customer Surveys	AC		AC		AC = Final disposition of summary report.	
1.1.040	132	Speeches, Papers, Presentations	AC		AC	R	AC = End of term in office or termination of service in a state position.	
1.1.041	133	Suggestion System Records	1		1			
1.1.043	134	Training Materials	US+1		US+1			
1.1.048	135	Litigation Files	AC+1		AC+1	R	AC = As applicable, decision of an agency not to file a lawsuit or decision that a lawsuit will not be fi led against it on a matter; dismissal of a lawsuit for want of prosecution or on motion of the plaintiff; or final decision of a court (or of a court on appeal, if applicable) in a lawsuit.	
1.1.053	136	Registration Logs	AC		AC		AC = Report fi led with the Texas Ethics Commission.	
1.1.055	137	Strategic Plans	AC+6		AC+6	A	AC = September 1 of odd-numbered calendar years.	
1.1.056	138	ADA (Americans with Disabilities Act) Documentation	3		3		28 CFR 35.105(c).	
1.1.057	139	Transitory Information	AC		AC		AC = Purpose of record has been fulfilled.	
1.1.058	140	Meeting Agenda and Minutes	PM		PM	A		

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1.1.059	141	Meetings, Certified Agendas or Tape Recordings of Closed	AC+2		AC+2		AC = The date of the meeting or completion of pending action involving the meeting, whichever is later.	
1.1.060	142	Meetings, Audio or Videotapes of Open	AC+90 days		AC+90 days		AC = Official approval of written minutes of the meeting by the governing body of an agency.	
1.1.061	143	Meeting - Notes	AC+90 days		AC+90 days		AC = Approval of the formal minutes by the governing body.	
1.1.062	144	Meetings - Supporting Documentation	2		2	A		
1.1.063	145	Staff Meeting Minutes and Notes	1		1			
1.1.064	146	Agency Performance Measure Documentation	FE+3		FE+3			
1.1.065	147	Reports and Studies (Non-Fiscal) Raw Data	AV		AV			
1.1.066	148	Reports – Biennial or Annual Agency (Narrative)	AC+6		AC+6	A	AC = September 1 of odd-numbered calendar years.	
1.1.067	149	Reports and Studies (Non-Fiscal)	3		3	R		
1.1.068	150	Reports on Performance Measures	AC+6		AC+6		AC = September 1 of odd-numbered calendar years.	
1.1.069	151	Reports –Activity	1		1			
1.1.070	152	Agency Rules, Policies, and Procedures-Final	AC+3		AC+3	R	AC = Completion or termination of program, rules, policies or procedures.	
1.1.071	153	Agency Rules, Policies, and Procedures-Working Files	AC+3		AC+3	R	AC = Completion or termination of program, rules, policies or procedures.	

Retention Codes (Field 7)				Archival Codes (Field 8)			
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1.1.072	154	Public Information Reports	2		2				
1.1.073	155	Administrative Hearings	AC+3		AC+3	R	AC = Last action.		
1.1.074	156	Sunset Review Report and Documentation	AC+3		AC+3	R	AC = After the subsequent Sunset Review.		
1.1.075	157	Alternative Dispute Resolutions-Final Agreement	AC+4		AC+4		AC = Date of final agreement. Texas Civil Practice and Remedies Code, Chapter 154.071.		
1.2.001	158	Destruction Authorizations	FE+3		FE+3				
1.2.003	159	Forms History File	AC+1		AC+1		AC = Discontinuance of use of form.		
1.2.004	160	Forms Inventory	US		US				
1.2.005	161	Records Retention Schedule (SLR 105)	US		US				
1.2.006	162	Records Transmittal Forms	AC+2		AC+2		AC = Date of authorization for destruction, permanent transfer from storage, or transfer to the Archives and Information Services Division, Texas State Library and Archives Commission, by the agency records management officer.		
1.2.008	163	Request for Authority to Dispose of State Records (RMD 102)	FE+3		FE+3				
1.2.010	164	Records Disposition Logs	10		10				
1.2.011	165	Record Center Storage Approval Forms (RMD 106)	US		US				
1.2.012	166	Records Inventory Worksheets	US		US				

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1.2.013	167	Records Control Locator Aids	AC		AC	AC = When control aid is updated, revised, or no longer needed.		
1.2.014	168	Records Management Plans	US+1		US+1			
1.2.015	169	Disaster Recovery Service Transmittals (RMD 109)	FE+1		FE+1			
1.2.016	170	Disaster Recovery Service Approval Form (RMD 113)	AC		AC	AC = Until superseded or termination of service.		
1.3.001	171	State Publications	AC+2		AC+2	AC = Until superseded or obsolete.		
1.3.002	172	Publication Development Files	AV		AV	R		
2.1.001	173	Processing Files	AC		AC	AC = Completion of 3rd verification cycle, or audit completion confirming successful transaction processing, or required audit trail maintenance, or the ability to restore or migrate when errors are detected or when hardware or software changes occur.		
2.1.002	174	Master Files	AC		AC	AC = Completion of 3rd verification cycle, or audit completion confirming successful transaction updates, or required audit trail maintenance, or the ability to restore or migrate when errors are detected or when hardware or software changes occur.		

Retention Codes (Field 7)

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AV – Administrative Value

CE – Calendar Year End
FE – Fiscal Year End

LA – Life of Asset
MO – Months

PM – Permanent
US – Until Superseded

Archival Codes (Field 8)

A – Transfer to State Archives
R – Review by State Archivist



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			Agency	Storage	Total			

2.1.007	175	Software Programs	AC		AC	AC = Until electronic records are transferred to and made usable in a new software environment or there are no electronic records being retained to meet an approved retention period that require the software to be retrieved and read. 13 TAC 6.94.		
2.1.008	176	Hardware Documentation	AC		AC	AC = Until electronic records are transferred to and made usable in a new hardware environment or there are no electronic records being retained to meet an approved retention period that require the hardware to be retrieved and read. 13 TAC 6.94.		
2.1.009	177	Technical Documentation	AC		AC	AC = Until electronic records are transferred to and made usable in a new hardware or software environment with new documentation or there are no electronic records being retained to meet an approved retention period that require the documentation to be retrieved and read. 13 TAC 6.94.		

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2.1.010	178	Audit Trail Records	AC		AC	AC = All audit requirements have been met.		
2.1.011	179	Finding Aids, Indexes, and Tracking Systems	AC		AC	AC = The related records have been destroyed.		
2.2.012	180	Output Records for Computer Production	AV		AV			
2.2.013	181	Quality Assurance Records	AC		AC	AC = No longer needed as an audit trail for any records modified.		
2.2.014	182	Internet Cookies	AV		AV			
2.2.015	183	History Files-Web Sites	AV		AV			
2.2.016	184	Software Registrations, Warranties and License Agreements	LA+3		LA+3			
3.1.001	185	Applications for Employment-Not Hired	2		2	29 CFR 1602.31		
3.1.002	186	Applications for Employment-Hired	AC+5		AC+5	AC = Termination of employment.		
3.1.006	187	Employee Counseling Records	AC+3		AC+3	AC = Termination of counseling.		
3.1.011	188	Employee Insurance Records	AC		AC	AC = Until superseded or termination of employment.		
3.1.012	189	Employment Opportunity Announcements	2		2	29 CFR 1602.31		
3.1.013	190	Employment Contracts	AC+4		AC+4	AC = Expiration or termination of the contract according to its terms.		
3.1.014	191	Employment Selection Records	2		2	29 CFR 1602.31		
3.1.018	192	Grievance Records	AC+2		AC+2	AC = Final decision on the grievance.		
3.1.019	193	Performance Appraisals	2		2	29 CFR 1620.32(c).		

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3.1.020	194	Personnel Corrective Action Documentation	AC+5		AC+5	AC = Termination of corrective action.		
3.1.021	195	Personnel Disciplinary Action Documentation	AC+5		AC+5	AC = Termination of employment.		
3.1.022	196	Personnel Information or Action Forms	2		2	29 CFR 1602.31		
3.1.023	197	Position/Job Descriptions	AC+4		AC+4	AC = Until superseded or job eliminated. 40 TAC 815.106(i).		
3.1.024	198	Physical Examinations/Medical Reports	AC+2		AC+2	AC = Until superseded or termination of employment.		
3.1.026	199	Criminal History Checks	AC		AC	AC = The criminal history record has served the immediate purpose for which it was obtained.		
3.1.027	200	Training and Educational Achievement Records (Individual)	AC+5		AC+5	AC = Termination of employment.		
3.1.029	201	Employment Eligibility, Documentation or Verification of	AC+1		AC+1	AC = Termination of employment.		
3.1.031	202	Employee Benefits-Other than Insurance	AC+2		AC+2	AC = Until superseded or termination of employment		
3.1.034	203	Resumes-Solicited	AV		AV			
3.1.035	204	Performance Bonds	AC+4		AC+4	AC = Expiration or termination of the bond according to its terms.		
3.1.036	205	Apprenticeship Records	5		5	29 CFR 30.8(e).		
3.1.037	206	Employee Recognition Records	AC+5		AC+5	AC = Termination of employment.		
3.1.038	207	Public Access Option Form	US		US			

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3.1.039	208	Ombudsman Records	AC		AC	AC = Final decision or matter closed.		
3.2.001	209	Employee Deduction Authorizations	AC+4		AC+4	AC = After termination of employee or after amendment, expiration, or termination of authorization, whichever sooner.		
3.2.002	210	Employee Earnings Records	4		4	40 TAC 815.106(i).		
3.2.003	211	Federal Tax Records	AC+4		AC+4	AC = Tax due date, date claim is filed, or date tax is paid whichever is later. 26 CFR 31.6001-1(e)(2).		
3.2.004	212	Income Adjustment Authorizations	2		2	29 CFR 516.6(c).		
3.2.005	213	W-4 Forms	AC+4		AC+4	AC = Until superseded, obsolete, or upon separation of employee. 26 CFR 31.6001-1(e)(2).		
3.2.006	214	Wage Rate Tables	2		2	29 CFR 516.6(a)(2).		
3.2.007	215	Unemployment Compensation Records	AC+5		AC+5	AC=Final payment		
3.2.008	216	Direct Deposit Application/Authorizations	US		US			

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3.2.009	217	State Deferred Compensation Records	AC+5		AC+5	AC = All accounts with a vendor or vendors for the individual participant have been closed. For instructions regarding the determination of the closure of accounts and for additional information regarding the retention period see the most current edition of the <i>Benefits Coordinator Reference Manual</i> issued by the Employees Retirement System of Texas.		
3.2.010	218	Human Resources Information System (HRIS) Reports	AC+4		AC+4	AC= After complete		
3.3.001	219	Affirmative Action Plans	5		5	29 CFR 30.8(e) for apprenticeship plans.		
3.3.004	220	Benefit Plans	US+1		US+1	29 CFR 1627.3(b)(2)		
3.3.010	221	Labor Statistics Reports	3		3			
3.3.011	222	Former Employee Verification Records	AC+75		AC+75	AC = Termination of employment.		
3.3.015	223	Positions/Job Classification Review File	US+3		US+3			
3.3.020	224	Work Schedules/Assignments	1		1			
3.3.022	225	Texas Workforce Commission (TWC) Reports	3		3			
3.3.023	226	Reimbursable Activities, Requests and Authorizations to Engage in	FE+3		FE+3			
3.3.024	227	Personnel Policies and Procedures	US+3		US+3			
3.3.025	228	Job Procedure Records	US+3		US+3			

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3.3.026	229	Agency Staffing Reports	US+3		US+3			
3.3.027	230	Aptitude and Skills Tests	US+2		US+2		29 CFR 1602.31	
3.3.028	231	Aptitude and Skills Tests(Test Papers)	2		2		29 CFR 1602.31	
3.3.029	232	Aptitude and Skills(Validation Records)	AC+2		AC+2		AC = As long as the test is used by an agency. 29 CFR 1602.31	
3.3.030	233	Training and Administration Records	US+2		US+2			
3.3.031	234	EEO Reports and Supporting Documentation	3		3		29 CFR 1602.32, 1602.39, 1602.41, 1602.48, and 1602.50.	
3.3.032	235	Equal Pay Records	3		3		29 CFR 1620.32.	
3.4.001	236	Accumulated Leave Adjustment Requests	FE+3		FE+3			
3.4.002	237	Leave Status Reports	FE+3		FE+3			
3.4.003	238	Less Than Full-Time Worked Reports	4		4		40 TAC 815.106(i).	
3.4.004	239	Overtime Authorizations	2		2			
3.4.005	240	Overtime Schedules	2		2			
3.4.006	241	Time Cards and Time Sheets	4		4		40 TAC 815.106(i).	
3.4.007	242	Time Off and / or Sick Leave Requests	FE+3		FE+3			
3.4.008	243	Sick Leave Pool Documentation	FE+3		FE+3			
4.5.006	86	Annual Operating Budgets	AC+6		AC+6		AC = September 1 of odd-numbered calendar years.	

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